

Inventory Management and Tracking System



Countermeasure Tracking Systems (CTS)

Inventory Management and Tracking System (IMATS)

System Setup & Basics

Version 7.0

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1 INTRODUCTION

The Centers for Disease Control and Prevention (CDC) Countermeasure Tracking Systems (CTS) Inventory Management and Tracking System (IMATS) provides state and local public health providers with a tool to track medical and non-medical countermeasure inventory and supplies during daily operations or an event. The system includes functions such as receipts, put away, and shipping. These functions allow users to enter detailed information about assets such as total number received, lot number, expiration date and storage location.

IMATS is deployed on the CDC network. CDC requires a level of security to ensure the protection of private and/or sensitive information from unauthorized disclosure, loss, or damage. The CDC Secure Access Management Services (SAMS) is an access management system that is designed to authenticate users and allow access to applications for which access rights have been granted. SAMS is the next generation replacement for CDC's legacy Secure Data Network (SDN) portal and does not require the use of digital certificates. SAMS will function as the access gateway to IMATS as well as the other Countermeasure Tracking System programs.

This document is intended to help administrators configure IMATS for use in their planning jurisdictions. There are two standard roles in IMATS: the public health administrator (PHA) and the facility administrator. The PHA role will be granted to users with high-level management or oversight responsibilities for a project area (one of CDC's 62 Public Health Emergency Preparedness Cooperative Agreement grantees, which include 50 states, four directly funded localities, three U.S. territories, and five freely associated states). The facility administrator is an individual who manages one or more facilities. This role is granted to administrators that do not fit in the PHA role and may be used for local or regional managers.

This document provides separate steps for each role necessary to set up IMATS for use. Options for setting up IMATS are included in Appendix B. Additionally, Appendix C includes a series of tasks that can be provided to new users as a training tool.

Training material is available on the IMATS webpage at [http://www.cdc.gov/phinf/tools/imats/under Supporting Information](http://www.cdc.gov/phinf/tools/imats/under%20Supporting%20Information). Additional materials are currently being developed and will be added to the IMATS webpage as they become available. All IMATS questions should be submitted to CTSHelp@cdc.gov.

2 SYSTEM SETUP

Prior to using IMATS to manage inventory, several items need to be configured. Please use the following steps to prepare the system for use. Facility administrators responsible for a single warehouse may skip Section 2.1.

2.1 FACILITIES

2.1.1 Add Facilities

Create facilities in IMATS for your project area.

To add a facility:

- On the **Setup** menu, click **Facility**, and then **Add Facility**.
- Under **New Facility**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area where the facility belongs
Region	No	Region within the project area where the facility is located
Facility Name	Yes	Name of the facility
Status	Yes	Status of the facility <ul style="list-style-type: none"> • Active: Supplies can be shipped to this facility • Inactive: Supplies cannot be shipped to this facility
Type of Distribution Site	Yes	Designates the type of distribution site.
RSS Site Priority	Conditional	Required only if Type of Distribution Site is State RSS.
Facility Type	Yes	Type of facility (for example, a hospital or local health department)
Facility Type, Other	Conditional	Required only if Facility Type is Other
POD, Closed	Conditional	Required only if Facility Type is POD, Closed

Field	Required?	Description
Type		
POD, Closed Type Other	Conditional	Required only if POD, Closed Type is Other.
Notes	No	Any text that you feel would be helpful to include

- Under **Ship to Address**, enter the following information:

Field	Required?	Description
Address Line 1	Conditional*	Facility's street address
Address Line 2	No	Continuation of the street address if needed
Longitude	Conditional*	Facility's longitude
Latitude	Conditional*	Facility's latitude
City	Yes	City where the facility is located
State	Yes	State where the facility is located
Zip Code	Yes	Facility's zip code
County	No	County where the facility is located

*The street address **or** longitude/latitude must be entered.

- Under **Receiving Capabilities**, enter the following information:

Field	Required?	Description
No Loading Dock Available	No	Select if the facility does not have a loading dock
Loading Dock(s) Available	No	Select if the facility has one or more loading docks
Number of Loading Docks	Yes: If you	Number of loading docks in the facility

Field	Required?	Description
	selected the Loading Dock(s) Available check box	
Accommodate 53-foot trailer	No	Select if the facility can accommodate a 53-foot trailer
Maximum truck size	No	Maximum truck size the facility can accommodate
Fork Lift Available	No	Select if the facility has a fork lift that can be used
Lift Gate available	No	Select if the facility has a lift gate that can be used

2.2 CONFIGURE USERS

Prior to the use of IMATS for inventory management, administrators must create the necessary custom roles and users for the system. There are two standard roles in IMATS: the PHA and the facility administrator. Roles needed within a project area or facility need to be created locally.

2.2.1 Custom Roles

Create necessary roles for your project area and/or facilities. For example, a custom role named “Pick Team” may be created with permissions to the pick and ship functions only.

To add a custom role:

- On the **Setup** menu, click **Custom Role**, and then **Add Custom Role**.
- Under **New Custom Role**, enter the following information:

Field	Required?	Description
Role Type	Yes	Designates the level the role is assigned to (facility level, for example)
Role Name	Yes	Name of the custom role
Description	No	Any text that you feel would be helpful in describing the

Field	Required?	Description
		role

- Click the **Next** button to add the permissions.

To assign permissions to the role:

- Under **New Custom Role Permissions**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area the role is assigned to
Facility	Yes	Facility or facilities within the project area the role is assigned to

- Under **Permissions**, select the check box next to each permission you want to assign. To select/deselect all permissions, select the **Select/Deselect all** check box.

NOTE: You must select at least one permission.

- When you are done, click the **Add** button. The system saves the information you entered, displays the previous page, and displays the role as a hyperlink on the right side of the page.

2.2.2 Add Users

Add users to your project area and/or facilities.

NOTE: All IMATS users must complete the SAMS proofing process prior to accessing IMATS, see [Appendix A](#) for details.

To enter the basic information:

- On the **Setup** menu, click **User**, and then **Add User**.
- Under **New User**, enter the following information:

Field	Required?	Description
Title	No	User's title (for example, Mr. ,Ms., Mrs., Dr.)
First Name	Yes	User's first name
Middle Name	No	User's middle name
Last Name	Yes	User's last name
Suffix	No	User's name suffix (for example, Jr., Sr., MD, RN)

- Under **User Role**, enter the following information:

Field	Required?	Description
Role	Yes	User's role when using IMATS
Project Area	Yes	Project area the user roles (and the user) are assigned to

- Under **Address**, enter the following information about the user's home or work location:

Field	Required?	Description
Address Line 1	No	User's street address
Address Line 2	No	Continuation line for user's street address, if needed
City	No	City
State	No	State
County	No	County
Zip Code	No	Zip code

- Under **Contact**, enter the following information:

Field	Required?	Description
Telephone	Yes	User's phone number
Ext	No	Extension of the user's phone number
Secondary Telephone	No	User's second phone number, if available
Ext	No	Extension of the user's second phone number
Email Address	Yes	User's email address

- Click the **Next** button.

To assign a facility to the user:

- In the **Facility** list, select the check box next to each facility you want to assign. To select/deselect all facilities, select the **Select/Deselect all** check box.
- Click the **Next** button.

To assign permissions to the user:

- In the **Available Permissions** list, all permissions are selected. De-select the check box next to each permission you do not want to assign to the user. To select/deselect all permissions, select the **Select/Deselect all** check box.

NOTE: You must select at least one permission.

- Click the **Done** button. The system saves the information you entered, displays the previous page, and displays the user as a hyperlink on the right side of the page.

2.3 IMPORT LOCAL DATA

The Import feature provided in IMATS allows users to upload data from their existing inventory management system(s). The local data will have to be translated into the proper format(s) as described below. Users may choose to use the import feature or to manually input their data as described in [Section 2.4](#).

The import function appends new records into the database and is not intended to be used to update current inventory data.

For a successful data import into IMATS, be sure to import in the following order:


1. Facilities
2. Storage Locations
3. Users
4. Suppliers
5. Products
6. Units of Measure
7. Inventory

NOTE: Import templates are available, please contact ctshelp@cdc.gov.

- At the top of the page, click **Setup**, and then **Import**.
- Under **Import Data**, enter the following information:

Field	Required?	Description
File	Yes	Name of the file containing the data you want to import Do one of the following: <ul style="list-style-type: none">• Enter a filename• Click the Browse button to select the file
Import Data File Type	Yes	File type you want to import File formats are listed in the following sections
Project Area	Conditional (Depends upon your user role)	Project area the users belong to
Facility	Conditional (Depends	Facility within the project area where material/user is located

Field	Required?	Description
	upon your user role)	

- Click the **Preview** button. The file displays so that you can make sure it is the one you want to import.
 - The import files should not contain a column heading row. If using the import templates provided by CTS Help, export the data to a tab delimited text file, open the text file, delete the first row and save the file.
- Is the correct file displayed?
 - If **Yes**, continue to the next step.
 - For Import Users
 - Click the **Next** button, and continue to assign permissions.
 - In the **Available Permissions** list, all permissions are selected. De-select the check box next to each permission you do not want to assign to the users. To select/deselect all permissions, select the **Select/Deselect all** check box.
 - **NOTE:** You must select at least one permission
 - Click the **Import** button. A confirmation message displays stating that the file will be loaded into IMATS.
 - Click the **OK** button. The system imports the file from your computer and processes it so that the users can log in and use IMATS.
 - If **No**, click the **Back** button, and repeat the previous two steps.
 - Click the **Import** button. A confirmation message will display stating that the file will be loaded into IMATS for the selected facility.
 - Click the **OK** button. The system imports the file from your computer and processes it so that you can view the items.
 - If the file is not formatted properly the issues will be flagged with the icon, . Fix any data issues and import the file.

2.3.1 Import Storage Locations – File Format

The location data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Location Name	Unique name for the inventory storage location	Yes	Alphanumeric	100

Field	Description	Required?	Data Type	Length
Status	Status of the location Valid values are Available, Blocked, Inactive, and Full	Yes	Alphanumeric	20
Receipts Only	If the storage location is in the receiving area this field should be "Yes".	No	Yes/No	1
Receipts Only	If the storage location is in the receiving area this field should be "Yes".	No	Yes/No	1
Location Type	Type of location Valid values include: <ul style="list-style-type: none"> • Cold Chain Freezer • Cold Storage • Damaged • DEA Controlled • Dry Storage • Hazardous • Other • Pallet • Push Package Container • Quarantine • Temperature Controlled 	Yes	Alphanumeric	70
Location Other	If Location Type "Other" is selected this field is required	Conditional	Alphanumeric	50
Maximum Capacity	Maximum storage capacity of the location	No	Integer	15
Square Footage	Storage location size in square feet	No	Decimal	7, 2 (i.e., 50000,25)
Notes	User notes on the storage	No	Alphanumeric	255

Field	Description	Required?	Data Type	Length
	location			

2.3.2 Import Supplier Data – File Format

The supplier data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Supplier name	Name of the supplier	Yes	Alphanumeric	120
Status	Status of the supplier The possible valid values are 'Active' and 'inactive'	Yes	Alphanumeric	70
Supplier Type	Type of supplier Valid values include: <ul style="list-style-type: none"> • Manufacturer • Distributor • Retailer • Federal Government • DSNS • Local Government • State Government 	Yes	Alphanumeric	70
Notes	User notes on the supplier	No	Alphanumeric	255
Address Line 1	Address of supplier	No	Alphanumeric	100
Address Line 2	Continuation of address if needed	No	Alphanumeric	100
City	City	No	Alphanumeric	80
State	State	No	Alphanumeric	4
Zip Code	Zip Code	No	Numeric	20

Field	Description	Required?	Data Type	Length
County	County	No	Alphanumeric	8
Contact Person	Name of the contact person for the supplier	Yes	Alphanumeric	100
Title	Title of the contact person	Yes	Alphanumeric	40
Phone Number	Phone number for the contact	Yes	Numeric	20
Phone Extension	Phone extension (if applicable) for the contact	No	Numeric	6
Fax	Fax number for the contact	No	Numeric	20
E-mail	E-mail address for the contact	No	Alphanumeric	80

2.3.3 Import Products – File Format

This is product configuration data for products that may be stored in the warehouse. This product information does not pertain to the actual inventory in a warehouse.

NOTE: Prior to importing products, the product manufacturers must be added (see [Section 2.3.2](#) and [Section 2.4.2](#)).

The products data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Product Name	Unique name of the product to be imported into IMATS	Yes	Alphanumeric	170
Pharmaceutical Product Flag	Identify if the item is a pharmaceutical item or a non-pharmaceutical item <ul style="list-style-type: none"> The value of 'Y' indicates that the current product is a pharmaceutical product The value of 'N' indicates that the product is a non-pharmaceutical product 	Yes	Alphanumeric	1

Field	Description	Required?	Data Type	Length
Item Number	Unique item number of the product This may be the National Drug Code (NDC) for pharmaceutical product or the serial number/stock number/Model Number for non-pharmaceutical products	Yes	Alphanumeric	50
Product Description	Text description of the product	No	Alphanumeric	120
Package Type	Type of package for the product See Appendix D for valid values	Yes	Alphanumeric	70
Package Size	Size of package (number of items in package type)	Yes	Alphanumeric	50
Size	Size of the non-pharmaceutical product	No	Alphanumeric	50
Strength	Product strength of pharmaceutical product	No	Alphanumeric	50
Supplier	Manufacturer name for the product	No	Alphanumeric	120
Notes	Notes on product	No	Alphanumeric	255

2.3.4 Import Inventory – File Format

The inventory data file includes the assets that are currently stored in a facility.

NOTES:

- Prior to importing inventory, the products (see [Section 2.3.3](#) and [Section 2.4.3](#)) and units of measure must be added

- The units of measure are added using Product → Products → Assign Unit of Measure.
 - The unit of measure (UOM) and units per UOM must match a UOM assigned to the product.
- The package type and package size must match the package type and size assigned to the product.
- The item number must be a unique number in IMATS.

The inventory data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Item Name	Name of the product	Yes	Alphanumeric	170
Pharmaceutical Product Flag	Identify if the item is a pharmaceutical item or a non-pharmaceutical item <ul style="list-style-type: none"> • The value of 'Y' indicates that the current product is a pharmaceutical product • The value of 'N' indicates that the product is a non-pharmaceutical product 	Yes	Alphanumeric	1
Item Number	Unique item number of the product This may be the NDC/stock number/model number/serial number	Yes	Alphanumeric	50
Package Type	Type of package for the product See Appendix D for valid values Must match the package type assigned to the product	Yes	Alphanumeric	70
Package Size	Size of package (number of items in package type) Must match the package size	Yes	Alphanumeric	50

Field	Description	Required?	Data Type	Length
	assigned to the product			
Size	Size of the non-pharmaceutical product	No	Alphanumeric	50
Strength	Product strength of pharmaceutical product Must match the strength assigned to the product	No	Alphanumeric	50
Supplier	Supplier name for the product	Yes	Alphanumeric	120
Location Name	Name of the location in the warehouse where the product is stored	Yes	Alphanumeric	100
Quantity	Number of inventory items in stock	Yes	Integer	10
Serial Number	Unique number for serialized items	No	Alphanumeric	50
Lot Number	Lot number of the product in inventory	Yes	Alphanumeric	50
Expiration Date	Expiration date Valid format DD-MMM-YYYY Example: 31-AUG-2011	Yes	Date	11
UOM	Unit of measure	Yes	Alphanumeric	50
Units Per UOM	Number of units per UOM	Yes	Integer	10

2.3.5 Import Users – File Format

The Import Users feature provided in IMATS allows users to be added in groups by their associated role. The user data will have to be translated into the proper format as described below. Users may choose to use the import feature or to manually input their users as described above.

The user data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Title	User's title (for example, Mr., Ms., Mrs., Dr.)	No	Alphanumeric	20
First Name	First Name of User	Yes	Alphanumeric	40
First Name	Middle Name of User	No	Alphanumeric	40
Last Name	Last name of User	Yes	Alphanumeric	40
Suffix	User's name suffix (for example, Jr., Sr., MD, RN)	No	Alphanumeric	20
Role	User Role	Yes	Alphanumeric	256
Address Line 1	Address	No	Alphanumeric	256
Address Line 2	Continuation of address	No	Alphanumeric	100
City	City	No	Alphanumeric	80
State	State	No	Alphanumeric	4
County	County	No	Alphanumeric	8
Zip Code	Zip code	No	Numeric	20
Phone Number	Contact phone number for the user Acceptable formats: <ul style="list-style-type: none"> • xxx-xxx-xxxx • (xxx)xxx-xxxx • xxxxxxxxxxxx • xxx.xxx.xxx 	Yes	Numeric	20
Phone Ext	Phone extension	No	Numeric	6
Secondary Phone Number	Secondary contact phone number for the user Acceptable formats:	No	Numeric	20

Field	Description	Required?	Data Type	Length
	<ul style="list-style-type: none">• XXX-XXX-XXXX• (XXX)XXX-XXXX• XXXXXXXXXX• XXX.XXX.XXXX			
Secondary Ext	Extension of the user's second phone number	No	Numeric	6
E-mail	User's e-mail address	Yes	Alphanumeric	80

2.3.6 Import Facilities – File Format

The facilities data file includes all required facility data.

The facility data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Facility Name	Name of the facility	Yes	Alphanumeric	120
Region	Region if used in the project area	No	Alphanumeric	40
Jurisdiction	Jurisdiction if used in the project area	No	Alphanumeric	40
Status	Status Valid values: Active and Inactive	Yes	Alphanumeric	8
Type of Distribution Site	Type of distribution site	Yes	Alphanumeric	50
RSS Site Priority	Site priority See Appendix G for valid values.	Yes, if “RSS” is selected as the Type of Distribution Site	Alphanumeric	50
Facility Type	Facility type See Appendix H for valid values.	Yes	Alphanumeric	50
Facility Type, Other	If ‘Other’ is selected as the Facility Type this field is required	Yes, if Facility Type “Other” is selected	Alphanumeric	50
POD, Closed Type	Type of POD	Yes, if “POD, Closed” is selected for Type of POD	Alphanumeric	50
POD, Closed Type, Other	If ‘Other’ is selected as the POD, Closed Type this field is required	Yes, if POD Closed Type “Other” is selected	Alphanumeric	50
Ship To Address	Street Address Line 1	Conditional	Alphanumeric	100

Field	Description	Required?	Data Type	Length
	Required data, if no Latitude/Longitude			
Ship To Address 2	Street Address Line 2	No	Alphanumeric	100
Ship To City	City	Yes	Alphanumeric	80
Ship To State	State Abbreviation	Yes	Alphanumeric	4
Ship To Zip Code	Zip Code	Yes	Numeric	10
Ship To County	County	No	Alphanumeric	50
Latitude	Latitude Required data, if no street address	Conditional	Alphanumeric	50
Longitude	Longitude Required data, if no street address	Conditional	Alphanumeric	50
Primary Contact Name	Contact Name	Yes	Alphanumeric	100
Primary Telephone	Phone	Yes	Numeric	12
Primary Ext	Phone extension	No	Numeric	6
Primary Cell	Cell phone number	No	Numeric	12
Primary Fax	Fax number	No	Numeric	12
Primary Email	E-mail Address	Yes	Alphanumeric	70
Secondary Contact Name	Contact Name	No	Alphanumeric	100
Secondary Telephone	Phone	No	Numeric	12
Secondary Ext	Phone extension	No	Numeric	6
Secondary Cell	Cell phone number	No	Numeric	12

Field	Description	Required?	Data Type	Length
Secondary Fax	Fax number	No	Numeric	12
Secondary Email	E-mail Address	No	Alphanumeric	70

2.3.7 Import Purchase Orders – File Format

The purchase orders data file contains all open purchase orders.

The facility data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Supplier Name	Supplier	Yes	Alphanumeric	120
Funding Source Type	Funding source type Valid values: Federal, State, Local, Tribal Regional, Donation	Yes	Alphanumeric	50
Funding Source	Funding source title	No	Alphanumeric	50
Order Date	Valid format DD-MMM-YYYY Example: 31-AUG-2011	Yes	Date	11
Notes	Notes on purchase orders	No	Alphanumeric	255
Product Name	Product name	Yes	Alphanumeric	50
Quantity	Number of items ordered	Yes	Integer	10
UOM	Units of measure	Yes	Alphanumeric	50
Units Per UOM	Number of units per UOM	Yes	Integer	10

2.4 MANUALLY INPUT LOCAL DATA

2.4.1 Add Storage Locations

To add one storage location at a time:

- On the **Setup** menu, click **Facility**, and then **Add Storage Location**.

- Under **New Storage Location**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area to which the storage location is assigned
Facility	Yes	Facility within the project area to which the storage location is assigned

- Under **Location**, enter the following information:

Field	Required?	Description
Name	Yes	Name of the storage location
Receiving Area Check box	No	Select this check box if the location is used only to receive items, not to store them on a more permanent basis
Type	Yes	Defines the type of items stored in the location
Type text box Enabled only if the Type field is Other	Yes If it is enabled	Enter the type of items stored in the location
Status	Yes	Status of the storage location <ul style="list-style-type: none"> Available: Inventory can be stored in the location Blocked: Inventory cannot be assigned to the location by the system; it must be stored manually Inactive: Inventory cannot be stored in the location, because it is not being used Full: Inventory cannot be stored in the location, because it is full
Square Footage	No	Square footage of the storage location Numbers and decimal points are allowed
Notes	No	Any text you feel it would be helpful to include

- Click the **Add** button. The system saves the storage location and displays it as a hyperlink on the right side of the page.

To add a range of storage locations:

- On the **Setup** menu, click **Facility**, and then **Add Range of Storage Locations**.
- Under **Add Range of Storage Locations**, enter the following information, if the fields display on your screen:

Field	Required?	Description
Project Area	Yes	Project area to which the storage location is assigned
Facility	Yes	Facility within the project area to which that storage location is assigned

- Under **Location**, enter the following information:

Field	Required?	Description
Name	No	Designates the main area where the range of storage locations is For example you might enter Room 100 or Receiving
Receiving Area Check box	No	Select this check box if the location is used only to receive items, not to store them on a more permanent basis
Type	Yes	Defines the type of items stored in the location
Type text box Enabled only if the Type field is Other	Yes: If it is enabled	Enter the type of items stored in the location
Status	Yes	Status of the location <ul style="list-style-type: none"> Available: Inventory can be stored in the location

Field	Required?	Description
		<ul style="list-style-type: none">• Blocked: Inventory cannot be assigned to the location by the system; it must be stored manually• Inactive: Inventory cannot be stored in the location, because it is not being used• Full: Inventory cannot be stored in the location, because it is full
Square Footage	No	Square footage of the storage location Numbers and decimal points are allowed

- Under **Location Ranges**, enter the following information for **each** level you want to add:

Field	Required?	Description
Start Range	Yes	First number (or letter) in the level
End Range	Yes	Ending number (or letter) in the level you are adding

- If you would like to include a separator between the levels, select one in the **Range Separator** field.

What is a separator?

A separator (a space, dash, comma, etc.) is placed between the levels in a location. Using a separator can make reading the location a little easier.

For example, if you have a location named **Floor 5Section 3Shelf 2**, you could add a comma between the levels so that the location would read **Floor 5, Section 3, Shelf 2**.

- If desired, do one of the following:
 - Click the **Preview Locations** link to view the storage locations you have created so far.
 - Click the **Clear Location Ranges** link to delete the information you have entered.
- Click the **Add** button. The system saves the range of locations and displays it as a hyperlink on the right side of the page.

2.4.2 Add Suppliers

To add a supplier:

- On the **Setup** menu, click **Supplier**, and then **Add Supplier**.
- Under **New Supplier**, enter the following information:

Field	Required?	Description
Project Area	No	Project area that is to receive supplies from the supplier If a project area is not selected, the supplier will be assigned to all project areas
Facility	No	Facility within the project area that is to receive supplies from the supplier If a facility is not selected, the supplier will be assigned to all facilities in the project area
Supplier Name	Yes	Name of the supplier
Status	Yes	Status of the supplier <ul style="list-style-type: none"> • Active: Supplier is a viable source of supplies

Field	Required?	Description
		<ul style="list-style-type: none"> • Inactive: Supplier is not a viable source of supplies <p>NOTE: An inactive supplier is not deleted from the system, which means you can still search for it and view or edit its information</p>
Supplier Type	Yes	Type of supplier (manufacturer, retailer, distributor, etc.)
Notes	No	Any text that you feel would be helpful to include

- Under **Address**, enter the following information:

Field	Required?	Description
Address Line 1	No	Supplier's street address
Address Line 2	No	Continuation line for supplier's street address, if needed
City	No	City where the supplier is located
State	No	State where the supplier is located
Zip Code	No	Supplier's zip code
County	No	County where the supplier is located

- Under **Contact**, enter the following information:

Field	Required?	Description
Name	Yes	Name of the supplier contact
Title	No	Title of the supplier contact (Mr., Ms., etc.)
Telephone	Yes	Contact's phone number
Ext	No	Extension of the contact's phone number
Fax	No	Contact's fax number
Email	No	Contact's e-mail address

- Click the **Add** button. The system saves the supplier and displays it as a hyperlink on the right side of the page.

2.4.3 Add Product Information

To add a product:

- On the **Setup** menu, click **Product**, and then **Add Product**.
- Under **New Product**, enter the following information:

Field	Required?	Description
Project Area	Conditional (Depends upon your user role)	Project area to which the product is assigned If a project area is not selected, the product will be assigned to all project areas
Facility	Conditional (Depends upon your user role)	Facility or facilities within the project area to which that product is assigned If a facility is not selected, the product will be assigned to all facilities in the project area
Product Item Number	Yes	Product identifier Enter the number, and then select either National Drug Code (NDC) or Stock Number or Model Number
Product Name	Yes	Name of the product
Package Type	Yes	The lowest unit that represents how the product is packaged If an antibiotic is packaged as capsules in a bottle, the package type is Bottle See Appendix D for valid values
Package Size	Yes	Number of items contained in the package type If an antibiotic is packaged 50 capsules to a bottle, the package size is 50
Strength	No	Strength of the product when administered or dispensed (75 mg, for example)

Field	Required?	Description
Size Enabled only if Product Item Number field is Stock Number or Model Number	No	Size of the product (medium or large, for example)
Product Description	No	Any text in describing the product
Manufacturer	No	Company that manufactured the product A manufacturer is a type of supplier If you don't see the manufacturer you are interested in, see Add a Supplier for instructions on adding it to the system
Notes	No	Any helpful text

- Click the **Add** button. The system saves the product and displays it as a hyperlink on the right side of the page.

2.4.4 Add Inventory

To add an inventory item:

- On the **Inventory Management** menu, click **Inventory**, and then **Add Inventory Item**.
- Under **Add Inventory Item**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area where the item is located
Facility	Yes	Facility within the project area where the item is located
Product Name	Yes	Name of the item you want to add Begin typing the name; after the first three characters, the system will list all products that match your entry
Storage Location Type	Yes	Allows user to filter the list of storage locations displayed in the Storage Location drop down list

Field	Required?	Description
Storage Location	Yes	Storage location where the item is stored
Serial Number	No	Item's serial number
Lot Number	Conditional (required for products with NDC)	Item's lot number
Product Expiration Date	Conditional (required for products with NDC)	Date the item expires Enter a date in mm/dd/yyyy format, or click the Calendar button to select a date
Funding Source Type	Yes	Type of funding source (state or local, for example)
Funding Source	No	Name of the funding source
Quantity	Yes	Total number of units located in inventory If the Quantity field is set to 10 and the Unit of Measure field is Box , this means 10 boxes are located in inventory
Unit of Measure	Yes	How the item is packaged (for example, bottle, box, etc.)
Units per UOM	Yes	Number of items contained in the unit of measure you entered in the Unit of Measure field If the Unit of Measure field is set to Box and the Units per UOM field is 20 , this means each box contains 20 units

- Click the **Add** button. The system saves the item and displays it as a hyperlink on the right side of the page.

3 APPENDIX A: SAMS ACCESS

All IMATS users must go through the CDC Secure Access Management Services (SAMS) proofing process prior to accessing the system. Please follow the steps below.

1. Send an email to ctshelp@cdc.gov stating that you would like to implement IMATS.
2. Provide the first name, last name, email address, phone number, role, and facility (if applicable) of individuals in your organization who will need access to the system. There are two main roles available in IMATS as well as custom roles, so please choose from the following:
 - a. Public Health Administrator (PHA) – user with high-level management or oversight responsibilities for a project area*. The PHA role should only be given to individuals at the project-area level who require access to ALL facilities in the project area. By default, a PHA in a project area can view and edit ALL items associated with ALL facilities in the project area.

**Project areas: CDC’s 62 Public Health Emergency Preparedness grantees, which include 50 states, District of Columbia, three major metropolitan cities, three U.S. territories, and five freely associated states.*
 - b. Facility Administrator – user who manages one or more facilities. The facility administrator role should be used for administrators that do not fit in the PHA role. This role may be used for local or regional managers. Facility administrators are able to access and edit ALL items in each facility to which they have access and can create new facility administrator accounts with the same or fewer permissions. Each facility administrator can have multiple facilities assigned to him.
 - c. Custom Role – user assigned to a single facility that will be given a custom role. The Countermeasure Tracking Systems (CTS) team will create user accounts for all PHAs and facility administrators. The PHA or facility administrator will be responsible for creating custom roles for specific users.
3. Complete the SAMS identity proofing process. Each individual will receive an email from sams-no-reply@cdc.gov once he or she has been added to SAMS with instructions on how to complete the process (click [SAMS training presentation](#) for a presentation that details this process).

4 APPENDIX B: SETUP OPTIONS

A PHA in a project area which has chosen to use IMATS as the sole inventory management system has many options when setting up IMATS. The three approaches below provide an idea of what is possible; however, each PHA may choose to implement the system in their own way.

4.1 CONFIGURE ALL

In this approach, the PHA would configure *ALL* facilities and users in the project area. The PHA may also set up all of the custom roles to be used by each facility.

4.2 FILTER DOWN

This approach would have the PHA set up the top level storage facilities in the project area as well as the administrator for each facility. For example, if Project Area A had two state facilities RSS 1 and RSS 2, the PHA would configure a facility for each of these sites and add a facility administrator for each. It would then be the responsibility of the two RSS administrators to configure IMATS for their facility as well as adding the facilities at the next level down as shown in Figure 1.

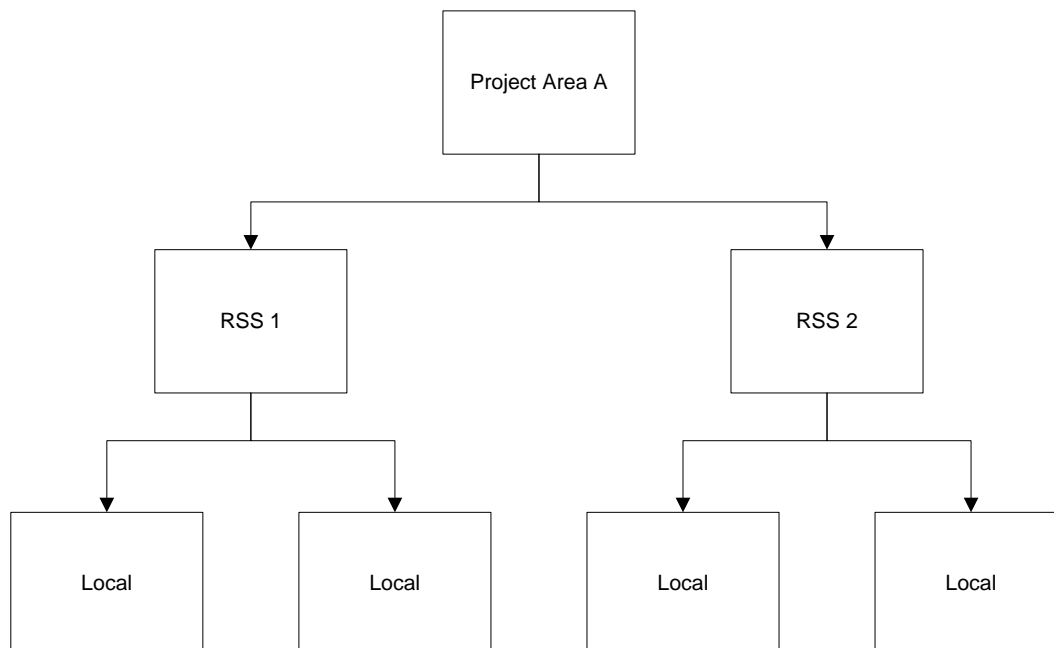


Figure 1 – Project Area Facilities

4.3 AS NEEDED

In this approach, each administrator is responsible for his or her facility or facilities. The administrator would only configure the suppliers, custom roles, users, etc. needed by the subject facility.

5 APPENDIX C: TASKS

The following tasks provide users with general steps to perform to become familiar with IMATS functionality. These tasks should be performed in the IMATS Training environment. A scenario is provided to give context to the tasks.

Scenario

A public health event has occurred in your project area and local areas need supplies to dispense to affected citizens. The Division of Strategic National Stockpile has notified you that 700 cases of doxycycline are being sent to one of your receipt, stage, and store (RSS) sites.

5.1 TASK 1: SEARCH FOR A FACILITY

- Timber Ridge Elementary School has been selected to act as a new point of dispensing (POD) for the current health event. You will begin distributing supplies to Timber Ridge.

Search to see if the school exists in your system as a facility.

1. Use the system to attempt to locate “Timber Ridge Elementary School”.

- Proceed to next task.

5.2 TASK 2: ADD A FACILITY

Currently new facilities have no users assigned by default.

- Add Timber Ridge Elementary School to your system. They have one loading dock and fork lift. Assign Timber Ridge Elementary School to your task lead.
 1. Add a new facility using the following information:
 - Facility: Timber Ridge Elementary School
 - Phone: 404-555-1212
 - Contact: John Smith
 - Email: jsmith@cobb.edu
 2. Create a secondary contact.
 3. Complete adding a facility.
- Proceed to next task.

5.3 TASK 3: CREATE A CUSTOM ROLE

- Create a custom role in your warehouse using the following information:
 1. Create your new custom role and enter the required information.
 2. The screen defaults to your project area and facility (if only one available).
 3. Role: Name your role (for example, “pick team”).
 - Custom Role Name: _____
 4. Review the results by searching the custom roles.
- Proceed to next task.

5.4 TASK 4: ADD A NEW USER

- So that another person in your staff may manage the receipt of the items, create a user, and assign that user a role.
 1. Create your new user and enter their required information.
 2. Assign your new user the role you created in the last task.
 3. Assign that user to the facility you created.
 4. Grant your new user all permissions.
 5. Complete adding a new user.
 6. Note the new user to use in further tasks.
 - First Name:_____
 - Last Name:_____
 7. Review the results by searching the user.
- Proceed to next task.

5.5 TASK 5: ASSIGN THE FACILITY TO NEW USER

This step cannot be performed until Timber Ridge Elementary School is assigned to the user performing the steps.

- Assign Timber Ridge Elementary School to your new user.
 1. Select “user” from the setup menu.
 2. Assign Timber Ridge Elementary School to your new user.
- Proceed to next task.

5.6 TASK 6: ADD A NEW SUPPLIER

- A local retailer has donated medical supplies to your warehouse. This retailer does not currently exist in your system.
 1. Locate the “supplier” screen.
 2. The screen defaults to your project area and facility.
 3. Define the vendor’s name and abbreviation (for example, “local vendor” or “LV”).
 4. Define status and type.
 5. Enter in placeholder data for their phone number and email.
- Proceed to next task.

5.7 TASK 7: SET UP YOUR WAREHOUSE

- Create a location in your warehouse using the following information:
 1. The screen defaults to your project area and facility (if only one available).
 2. Location: Name your location (for example, “REC-1A”).
 - Location:_____
 3. Location status: available.
 4. Review the results by searching the locations.
 5. Repeat the step above to add a receiving area location.
- Proceed to next task.

5.8 TASK 8: SET UP YOUR WAREHOUSE – ADD RANGE

- Create a range of locations in your warehouse using the following information:
 1. The screen defaults to your project area and facility.
 - Location: 1st floor
 - Storage level: Start range (a to z)
 - Storage level: End range (1 to 10)
- Proceed to next task.

5.9 TASK 9: ASSIGN A UNIT OF MEASURE TO A PRODUCT

1. Assign a unit of measure (cases with 50 units per case) to a product.

Doxycycline 100mg oral tablet, #20 tab unit of use

NDC – 24658-220-20

NOTE: This unit of measure is just for testing and may not be a true unit of measure for this product. This NDC pertains to a bottle containing 20 tablets. The unit of measure reflects how many units (in this case bottle) are in a case or pallet.

- Proceed to next task.

5.10 TASK 10: ADD A PURCHASE ORDER

- The truck carrying the 700 cases of doxycycline from DSNS is expected to arrive at RSS site in six hours. Place your expected material into IMATS by creating an order to DSNS.
 1. Create a new purchase order. The screen defaults to your project area and facility.
 2. Add the item (begin typing to populate the items available).

Doxycycline 100mg oral tablet, #20 tab unit of use, NDC – 24658-220-20
 3. Add 700 cases with 50 units per case. This is the unit of measure you added in task 10.
 4. Complete adding the order (which will generate purchase order [PO] #).
 5. Write down the PO# for later use.
 - PO#:_____
 6. Review the results by searching order.
- Proceed to next task.

5.11 TASK 11: RECEIVE YOUR PURCHASE ORDER

- The truck carrying the supplies has arrived at your RSS site. The supplies have been unloaded and stored in a temporary holding area. Add these additional items into your inventory using IMATS.
 1. Select “receipt” from the menu.
 2. Locate the purchase order.
 3. Select the purchase order and follow the link to receive against each item in that purchase order.
 4. Enter date received, receipt location, quantity, and other required information.
 5. Select a receiving location:
 - Location:_____
 6. Complete adding the receipt.
 7. Note the temporary holding location.
 8. Verify inventory levels in the location.

Hint: There are two ways to find this information: navigate to the “storage location” screen or search the inventory.

- Proceed to next task.

5.12 TASK 12: PUT AWAY THE ITEMS

- You have requested that your floor staff move the doxycycline shipment to a different holding area. They have done this.

1. Select “put away” from the menu.
2. Locate the purchase order.
3. Select the purchase order and follow the link to assign put away location.
4. Select a put-away location.

- Location: _____.

Hint: Select “load all locations”, to show all available locations from the drop-down.

5. Select and put away the item.
6. Print the put-away list by selecting “print list”.

- Proceed to next task.

5.13 TASK 13: CONFIRM THAT YOUR ITEMS HAVE BEEN PUT AWAY

- Due to the presence of untrained volunteers assisting in the movement of your doxycycline shipment, you ask your regular staff to confirm that all 700 cases of doxycycline were put away together.

1. Locate the purchase order.
2. Confirm the put away by verifying the item.
3. Verify inventory levels in the location.

Hint: There are two ways to find this information: navigate to the “storage location” screen or search the inventory.

- Proceed to next task.

5.14 TASK 14: CREATE A PICK LIST

- You have received an order from Timber Ridge Elementary School. Create a pick list of the items that your warehouse staff will take off your shelves.
 1. Create a new pick list.
 2. Enter in PO #12345.
 3. Select “project area” and “facility”.
 4. Select “Timber Ridge Elementary School” as the ship to facility to receive the items.
 5. Add 400 cases of “doxycycline 100mg oral tablet, #20 tab unit of use, 20 bot” to your pick list.
 6. To select the product, begin typing the item’s name in the product name.
 7. Fulfill the pick from the locations provided.
 8. After entering the item, save the pick list.
 9. Note the order number to use in further steps.
 - Order Number: _____
- Proceed to next task.

5.15 TASK 15: PICK AND VERIFY THE PICK LIST

- You and several volunteers have picked the items off the shelves and stored them at the loading dock. Mark your pick list as “picked”.

1. Locate the pick list created in the previous task.
2. Print the pick list by selecting “print list”.
3. Select and pick the items.
4. Select and verify the items.
5. Verify remaining inventory levels in the location.

Hint: There are two ways to find this information: navigate to the “storage location” screen or search the inventory.

- Proceed to next task.

5.16 TASK 16: FIND YOUR SHIPMENT AND EDIT DETAILS

- Locate your shipment and enter shipment details. Timber Ridge Elementary School is stocked to capacity and would like you to move your shipping date one week. Edit your shipment details by setting its status to “hold”. The shipment will be sent by truck. Print your invoice.
 1. Locate your shipment.
 2. Edit your shipment details and enter shipment information.
 3. Print pallet labels and shipping document.
- Proceed to next task.

5.17 TASK 17: RECEIVE ITEMS WITHOUT PURCHASE ORDER

- A local supplier has donated 100 bottles of 45 mg strength Tamiflu to your warehouse. Each bottle contains 40 tablets. In addition, the supplier has promised to provide regular shipments of Tamiflu for as long as the health event continues. The items that were donated have reached your warehouse.

1. Select “receive” from the menu.
2. Add a new receipt.
3. The screen defaults to your project area and facility.
4. Enter supplier, funding source, product, location, quantity, and other required information.
5. Select a receipt location. Location: _____
6. Verify updated inventory levels in the location.

Hint: There are two ways to find this information: navigate to the “storage location” screen or search the inventory.

7. Do “put away” as explained in previous tasks.

6 APPENDIX D: PACKAGE TYPE VALID VALUES

The following table lists the valid values for package type. Use the abbreviation for import files.

Package Type	Abbreviation
AMPULE	AMP
APPLICATOR	AP
BAG	BAG
BLISTER PACK	BLPK
BOTTLE	BOT
BOTTLE, WITH APPLICATOR	BOTAP
BOTTLE, DISPENSING	BOTDIS
BOTTLE, DROPPER	BOTDR
BOTTLE, GLASS	BOTGL
BOTTLE, HDPE	BOTHD
BOTTLE, PLASTIC	BOTPL
BOTTLE, PUMP	BOTPU
BOTTLE, SPRAY	BOTSPR
BOTTLE, UNIT-DOSE	BOTUD
BOX	BOX
BOX, UNIT-DOSE	BOXUD
CAN	CAN
CASE	CASE
CELLO PACK	CELLO
CARTON	CRTN
CANISTER	CSTR

Package Type	Abbreviation
CANISTER, REFILL	CSTRRE
CARTRIDGE	CTG
CONTAINER	CTR
CUP	CUP
CUP UNIT-DOSE	CUPUD
CYLINDER	CYL
DEWAR	DEW
DIALPACK	DLPK
DRUM, FIBER	DRMFI
DRUM	DRUM
DOSE PACK	DSPK
EACH	EA
INHALER	INHL
INHALER, NASAL	INHLNA
INHALER, REFILL	INHLRE
JAR	JAR
JUG	JUG
KIT	KIT
NOT STATED	NS
PACKAGE	PKG
PACKAGE, COMBINATION	PKGCOM
PACKET	PKT
POUCH	POU

Package Type	Abbreviation
SUPERSACK	SUPSACK
SYRINGE	SYR
SYRINGE, GLASS	SYRGL
SYRINGE, PLASTIC	SYRPL
SYRINGE, PRE-FILLED	SYRPRE
TABMINDER	TABMIND
TANK	TANK
TRAY	TRAY
TUBE	TUBE
TUBE, WITH APPLICATOR	TUBEAP
VIAL	VIAL
VIAL, DISPENSING	VIALDIS
VIAL, GLASS	VIALGL
VIAL, WITH INJECTION SET	VIALINJ
VIAL, MULTI-DOSE	VIALMD
VIAL, PATENT DELIVERY SYSTEM	VIALPAT
VIAL, PHARMACY BULK PACKAGE	VIALPHR
VIAL, PIGGYBACK	VIALPIG
VIAL, PLASTIC	VIALPL
VIAL, SINGLE-DOSE	VIALSD
VIAL, SINGLE-USE	VIALSU

7 APPENDIX E: GLOSSARY

The following table lists common terms used throughout IMATS.

Term	Definition
Back Order	A process for handling requested items that are not available in inventory.
Custom Role	A role assigned to a user that has been customized with specific permissions required for the user to perform his/her job tasks.
Data Exchange	The process used for exchanging requests for inventory counts from CDC to project areas and reports of inventory counts from project areas to CDC.
Data Exchange Report	A collection of inventory counts for a specific project area and reporting date usually generated by the project area and transmitted to CDC.
Data Exchange Request	A request made by CDC to the project areas for a report of inventory counts of specific products.
Facility	Any place where inventory is stored. This could be a distribution center, warehouse or a store room within a hospital.
Funding Source	The entity that supplies monies for products.
Inventory Management and Tracking System (IMATS)	The IMATS solution provides state and local public health providers with a tool to track medical and non-medical countermeasure inventory and supplies during daily operations or an event. The solution tracks quantity of inventory and facilitates warehouse operations, including receiving, staging, and storing inventory.
Item Number	The National Drug Code (NDC) or stock number for a product.
Jurisdiction	Locality, as defined by the project area not the CDC, within the project area where a facility is located.
Move Inventory	Process used to move items from one storage location to another within a facility.
National Drug Code (NDC)	The unique numeric identifier for a packaged pharmaceutical as recognized by the Food and Drug Administration (FDA).
Non-pharmaceutical	A product that is not a prescription drug. Examples include personal

Term	Definition
	protective equipment and medical/surgical supplies or equipment.
Package Size	For pharmaceuticals, this is the amount of product in a package. For example, 50 tablets in a bottle. For non-pharmaceuticals, an example would be “1” when “Each” is selected for the package type.
Package Type	For pharmaceuticals, this is the packaging noted in the third segment of the NDC. Possible types include vial, bottle, box, and blister pack. For non-pharmaceuticals, the package type chosen should properly identify the smallest unit used for the product. For example, “Box”, “Carton” or “Each”. See Appendix E for valid values
Pharmaceutical	A drug or medicine used in medical treatment.
Pick	The process of selecting or pulling items from storage in order to fill a request for products.
Product	A pharmaceutical or non-pharmaceutical inventory item.
Project Area	A recipient of funds from CDC’s Public Health Emergency Preparedness (PHEP) cooperative agreement. The 62 recipients include 50 states, Washington, D. C., Chicago, Los Angeles, New York City, and eight territories and freely associated states.
Purchase Order (PO)	A list of products that a facility requests from a supplier.
Push Package File	A push package file contains information about containers (and their contents) received from the Division of Strategic National Stockpile (DSNS) during a national event.
Put Away	The process used to move items from a receiving area to storage location.
Region	Locality, as defined by the project area not the CDC, within the project area where a facility is located.
Request	A list of products that a facility requests from another IMATS facility.
Ship From	The facility that is shipping items.
Ship To	The facility that is receiving items.
Standard Unit of Measure	A unit of measure that has a constant number of units. For example “Dozen” will always have twelve units.

Term	Definition
Storage Location	A physical location within a facility. For example, "Receiving Dock 1A" or "Shelf 1A3C".
Strength	The amount of active ingredient present in each dosage (for example, 500 mg).
Supplier	Any entity that provides products. This could be a vendor, manufacturer (maker of the product), or a facility.
Type of Distribution Site	Designates the type of distribution site a facility is. For example, treatment center, point of dispensing, etc.
Unit of Measure (UOM)	The unit used for counting items, such as case, box, pallet or each.

8 APPENDIX F: DATA EXCHANGE

IMATS includes the Data Exchange feature. This feature works in conjunction with the Inventory Data Exchange (IDE) application.

The following steps illustrate how the Data Exchange feature collects inventory count information and then integrates into IMATS. The Data Exchange feature is only available to those with the public health administrator role.

1. From the IDE, CDC DSNS creates and sends a request for inventory count information to participating project area IMATS users.
2. IMATS automatically creates an IDE report using the current project area data found in IMATS.
3. For IMATS users that collect data from local-level health departments, a data exchange export function is available and provides the ability to convert the IDE request into either an Excel spreadsheet or an XML file. This file can then be forwarded to the health departments.
4. The health departments enter the necessary data into the file and return it to the sender via e-mail, fax or other mode of transmission.
5. IMATS Data Exchange provides an import function for the local data. This function imports data contained in the Excel spreadsheets and XML files received from the health departments and adds it to the IDE Report.
6. The project area user reviews and approves the IDE report and then sends the report to CDC DSNS via IMATS Data Exchange.

To search inventory count requests:

- On the **Data Exchange** menu, click **Search Requests**.
- Enter search criteria, and then click the **Search** button.
- To view details of a request, click the link in the **Request Name** column to display the request.

Field	Description
Request #	ID assigned to the request
Request Name	Name assigned to the request
Request Status	Status of the request Active:

To search and/or send inventory count reports to CDC:

- On the **Data Exchange** menu, click **Search Reports**.
- Enter search criteria, and then click the **Search** button.
- To view details of a report, click the link in the **Report Name** column to display the report.
- To send the report to the CDC, click the **Send** button.

Field	Description
Project Area	ID assigned to the request
Report Status	Status of the report

9 APPENDIX G: RSS SITE PRIORITY VALID VALUES

The following table lists the valid values for RSS site priority. Use the abbreviation for import files.

RSS Site Priority	Abbreviation
Primary	P
Secondary	S
Tertiary	T

10 APPENDIX H: FACILITY TYPE VALID VALUES

The following table lists the valid values for facility type. Use the abbreviation for import files.

Facility Type	Abbreviation
Alt. Care Facility	ALTCARE
Commercial Pharm	COMMPHARM
Community Clinic, Othr	COMMCLNC
Correctional Facilities	CORRECTIONS
Fed Facilities	FEDFAC
Fed Qualified Comm Hlth Clinic	FEDHLTHCLNC
Hospital	HOSP
Indian Health Svc	HIS
Local Health Dept	LHD
Nursing Home/Assisted Living	NURSHOME
Other	OTHR
POD, Closed	POD-C
POD, Open	POD-O
Private Physician	PRIVPHYS
Storage Facility	STRGFAC
Tribal Govt	TRIBAL
Visiting Nurse/Home Hlth	VISITNURS